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ABSTRACT

A financial customer support system provides an integrated gateway to a service operator fielding financial service calls via a call center or other facility. Service attendants taking calls via an automatic call distributor or other channels have access to a workstation communicating with the transaction server, which in turn has access to multiple information sources for mutual fund families, tax and other information. Because the attendants at the call center or other service site need not resort to printed information or need to correlate information from multiple sources, responsiveness is increased and quality of information is improved. Different levels or hierarchies may be clicked through or accessed according to particular client requests.

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